

USF

St. Petersburg 2014-15 Work Plan



University of South Florida St. Petersburg
Work Plan Presentation for 2014-15 Board of Governors Review



INTRODUCTION

The State University System of Florida has developed three tools that aid in guiding the System's future.

- 1) *The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) *The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) *Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.

The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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MISSION STATEMENT (What is your purpose?)

The University of South Florida St. Petersburg offers distinctive graduate and undergraduate programs in the arts and sciences, business, and education within a close -knit, student -centered learning community that welcomes individuals from the region, state, nation and world. We conduct wide-ranging, collaborative research to meet society's needs and engage in service projects and partnerships to enhance the university and community's social, economic and intellectual life. As an integral and complementary part of a multi-institutional system, USF St. Petersburg retains a separate identity and mission while contributing to and benefiting from the associations, cooperation, and shared resources of a premier national research university.

VISION STATEMENT (What do you aspire to?)

The University of South Florida St. Petersburg will be a premier master's degree level urban university recognized for its vibrant community of scholars who engage and improve the community.

STATEMENT OF STRATEGY (How will you get there?)

Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.

While presently guided by USFSP's current strategic plan, mission and vision, our strategies are also informed by the ongoing strategic planning process for 2014-2019, *Vision 20/20*. To achieve USFSP's goal of creating a distinctive identity as a top teaching and research institution, USFSP will emphasize faculty scholarship and research, student performance and discovery, campus culture, and strategic partnerships. USFSP will pursue these goals by providing the organizational infrastructure and the sustainable funding to make this possible. Throughout this process, USFSP's top priority is student success through increased student retention and graduation rates.

It will measure its success through a combination of internal and external measures, including academic performance, student retention, degree completion, campus culture, employment after graduation, national recognition of faculty excellence, and increased external funding. Recognized by the Carnegie Foundation for the Advancement of Teaching as a community-engaged institution, USFSP will also continue to emphasize and assess civic engagement.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities, opportunities and challenges for improvement?

USFSP's core capabilities include excellence in teaching using all forms of delivery, high levels of faculty-student interaction, faculty achievement, entrepreneurial spirit, strong and collaborative community engagement, key partnerships, and data-based decision-making. USFSP provides students with an intimate intellectual environment to facilitate their growth as active learners and instill life-long habits of the mind. USFSP has high potential for carefully planned and managed growth in enrollment as it retains its institutional character of close faculty-student interactions.

Beginning with Fall of 2014, USFSP expect undergraduate enrollments to grow by 3 percent each year over the next three years for FTIC and transfer students, with concomitant growth in graduate enrollments. The recruitment and retention of full-time FTIC students will continue to be a focused effort. The institution's strengths (residential character of the campus, partnership with USF System, high quality of faculty and programs, undergraduate research opportunities, dynamic waterfront location) will make USFSP a "first choice" for those living in Pinellas County and beyond. In addition, transfer students are an important market for this institution. USFSP will continue to work with St. Petersburg College to provide the last two years of a college degree for those who are location-bound. The campus's close proximity to major employers (HSN, Jabil Circuits, Raymond James, All Children's Hospital, Bayfront Medical Center) make the institution an ideal partner for working adults seeking to pursue master degrees in information technology, financial services, and allied health. Responding to the employment needs/gaps identified by industry partners and the BOG, USFSP will create and provide access to high demand programs.

Increased emphasis on campus culture and enhanced opportunities for student engagement provide strategic opportunities for improvement, particularly with retention and graduation rates. As our STEM programs prosper, we have growing demands for teaching and laboratory space, as well as financial aid for a student population that is increasingly needy.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.

1. Provide the requisite physical, human, and technological infrastructure for USFSP to sustain its current areas of excellence and to grow by design.
 - Enhance current facilities to support current and future extant programs and faculty and student needs, including classrooms, laboratories, studios, and the student service corridor.
 - Assess and enhance infrastructure for career development, internships, partnerships, community engagement, and the experience for freshmen, sophomore, and transfer students.
2. Increase the number of tenure track appointments and balance the ratio of fulltime and part-time faculty. In order to set the stage for a long future of high quality academic programs, at both the undergraduate and graduate levels, as well as scholarly productivity and national recognition, USFSP will recruit additional full-time faculty in key disciplines. This will facilitate the continued enhancement of the student experience through increased opportunities for faculty mentorship of undergraduate and graduate student research, increased engagement of faculty with the students; and increased student retention and degree completion.



3. Develop and implement a focused initiative for greater student retention and graduation. This will be a coordinated, university-wide effort involving numerous constituencies and organizational units, including academic advising, tutoring services, wellness and counseling, admissions, residential life and education, student life and engagement, the library, and all academic units.

In 2013-2014, the institution participated in a major retention study conducted by the leading national authorities in the area, the firm of Scannell and Kurz. Their findings, which will be reported to the institution's leadership team in June, will inform ongoing changes and strategies to institutionalize retention, progression and graduation rates as institution-wide priorities. Initiatives to address retention and graduation have already been implemented: repurposing resources to create a student success center located in the heart of the campus; four-week academic progress checks with follow up by advising; increased academic tutoring; analyses of schedules and course offerings to facilitate progression. By 2015-2016, USFSP expects to increase freshman retention to 65 percent, 6-year graduation rates to 47 percent and decrease average time-to-degree to 5 years.



PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Metrics Common To All Universities						
Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation	4% Δ	72%	73%	74%	75%	76%
Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation	6% Δ	\$34,800	\$35,148	\$35,500	\$35,855	\$36,214
Average Cost per Bachelor's Degree [Instructional Costs to the University]	Reported at the USF System Level					
FTIC 6 year Graduation Rate [Includes full- and part-time students]	8% Δ	40%	44%	45%	46%	47%
Academic Progress Rate [FTIC 2 year Retention Rate with GPA>2]	-3% Δ	74%	75%	76%	77%	78%
University Access Rate [Percent of Fall Undergraduates with a Pell grant]	2% Δ	39%	39%	39%	39%	39%
Bachelor's Degrees Awarded Within Programs of Strategic Emphasis [Based on list approved by BOG at 11/2013 meeting]	-2% Δ	37%	40%	44%	47%	49%
Graduate Degrees Awarded Within Programs of Strategic Emphasis [Based on list approved by BOG at 11/2013 meeting]	1% Δ	31%	31%	33%	38%	44%
Board of Governors Choice Metric						
Percent of Bachelor's Degrees Without Excess Hours	n/a	59%	62%	63%	64%	65%
Board of Trustees Choice Metric						
Postdoctoral Students	0% Δ	0	0	0	0	0

Note: Metrics are defined in appendix.



KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'¹, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

¹ The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

Goals Common to All Universities

Academic Quality

National Ranking for University and Programs

At the institutional level, USFSP continues to be ranked in the top 50 among regional public universities in the South by *US News and World Reports*. The USFSP College of Business is accredited by AACSB in both business and accounting, a double honor held by 1% of colleges of business globally. In 2014, USFSP's MBA program was ranked in the top 100 on-line programs in the US and 4th in FL by *US News and World Reports*. USFSP also offers its students memberships in 10 national honor societies and continues to seek membership at both the disciplinary and institutional levels.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
SAT Score [for 3 subtests]	-3%Δ	1585	1636	1640	1642	1644
High School GPA	2%Δ	3.57	3.78	3.79	3.8	3.81
Professional/Licensure Exam First-time Pass Rates ¹						
Exams Above Benchmarks	n/a					
Exams Below Benchmarks	n/a					
				Reported at the USF System Level		

Operational Efficiency

Freshman Retention Rate	-8%Δ	60%	61%	63%	64%	65%
FTIC Graduation Rates						
In 4 years (or less)	12%Δ	23%	25%	26%	26%	27%
In 6 years (or less)	8%Δ	40%	44%	45%	46%	47%
AA Transfer Graduation Rates						
In 2 years (or less)	-3%Δ	22%	24%	25%	26%	28%
In 4 years (or less)	1%Δ	58%	60%	61%	62%	63%
Average Time to Degree (for FTIC)	13%Δ	5.2 yrs	5.2 yrs	5.1 yrs	5.1 yrs	5 yrs

Return on Investment

Bachelor's Degrees Awarded	23%Δ	826	857	882	908	935
Percent of Bachelor's Degrees in STEM	3%Δ	8%	10%	15%	18%	20%
Graduate Degrees Awarded	-9%Δ	143	176	181	186	192
Percent of Graduate Degrees in STEM	5%Δ	6%	8%	8%	9%	9%

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Bachelor's Degrees in Areas of Strategic Emphasis	15% Δ	304	324	360	370	390
Percent of Course Sections Offered via Distance and Blended Learning*	Not avail.	18%	18%	22%	25%	26%
Maintain Carnegie Community Engagement Classification	100%*	xx	xx	xx	xx	xx

*Data populated by USFSP.

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

Goal 1. *Improve baccalaureate retention and graduation (USF System Goal 1); USFSP will focus on improving student outcomes in key mathematics courses through continued implementation of its Quality Enhancement Plan; focus on improving access to academic support (i.e., tutoring); continued emphasis on strengthening academic advising; and university-wide interventions for increasing student success.*

Metric: Increase 6-year FTIC baccalaureate graduation rate.	8% Δ	40%	44%	45%	46%	47%
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*USFSP earned this designation in 2011-12 and will retain this designation through 2015, the next application cycle.



FISCAL INFORMATION

University Revenues (*in Millions of Dollars*)

	2013-14 Actual	2014-15 Appropriations
Education & General – Main Operations		
State Funds	\$ 22.3	\$24.3
Tuition	\$25.9	\$26.2
TOTAL MAIN OPERATIONS	\$ 48.2	\$50.5
Education & General – Health-Science Center / Medical Schools		
State Funds		
Tuition		
TOTAL HSC	\$ 0.0	\$0.0
EDUCATION & GENERAL TOTAL REVENUES	\$ 48.2	\$50.5

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises		
Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.		
Revenues	\$ 13.0	n/a
Contracts & Grants		
Resources received from federal, state or private sources for the purposes of conducting research and public service activities.		
Revenues	\$ 3.7	n/a
Local Funds		
Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, inter-collegiate athletics, technology fee, green fee, and student life & services fee.		
Revenues	\$ 4.4	n/a
Faculty Practice Plans		
Revenues/receipts are funds generated from faculty practice plan activities.		
Revenues		n/a
OTHER BUDGET ENTITY TOTAL REVENUES	\$ 21.1	n/a
UNIVERSITY REVENUES GRAND TOTAL	\$ 69.3	n/a



FISCAL INFORMATION (continued)

Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,100	\$3,152	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$1,054	\$1,054	\$1,054	\$1,054	\$1,054
Percent Increase	11%	1.7%	0%	0%	0%
Required Fees¹	\$1,562	\$1,615	\$1,615	\$1,615	\$1,615
TOTAL TUITION AND FEES	\$5,716	\$5,821	\$5,821	\$5,821	\$5,821

Note¹: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	40%	48%	48%	55%	55%
Average Amount of Debt for Bachelor's who have graduated with debt	\$20,827	\$22,836	\$24,096	\$19,858	\$20,000
NSLDS Cohort Year	2008	2009	2010	2011	2012 GOAL
Student Loan Cohort Default Rate (3rd Year)	10.1%	9.8%	7.5% <i>draft</i>	n/a	xx%

Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,820	\$1,000	\$9,250	\$1,600	\$2,500	\$20,170
AT HOME	\$5,820	\$1,000	\$4,620	\$1,600	\$2,500	\$15,540

Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	717	37%	\$11,563	-\$2,378	\$7,682	\$4,446
\$40,000-\$59,999	253	13%	\$13,563	\$48	\$5,250	\$3,225
\$60,000-\$79,999	190	10%	\$15,299	\$2,118	\$3,257	\$4,574
\$80,000-\$99,999	146	8%	\$16,660	\$3,164	\$2,108	\$4,650
\$100,000 Above	429	22%	\$16,911	\$3,369	\$1,984	\$3,888
Missing*	202	10%	n/a	\$4,870	\$417	\$154
TOTAL	1,937	100%	AVERAGE	\$14,614*	\$826	\$4,491
						\$3,743

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) minus the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) minus the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	June 3, 2014
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	All undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$35.14
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$0
Total differential fee revenue generated in 2014-15 (projected):	\$3,338,300
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>Cost-efficient utilization of instructional technology and innovation, along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> • Need-Based Financial Aid (at 40%): Expand access for students; and accelerated path to graduation. Provide much needed financial support for talented students with limited income. • Expanding the High Skilled Workforce and Supporting Job Placement Expanded degree production in Areas of Strategic Emphasis; Strengthened relationships with business and industry; Increased number of internships; Expanded professional support for job placement through USFSP's Career Center. • Academic Advising: Enhanced academic advising through technology and additional professional staff; focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours. Improved tracking of students and graduates. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>Request to Modify or Waive Tuition Differential Uses</p> <p>(pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)</p>	

FISCAL INFORMATION (continued)



TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2013-14 academic year.

2013-2014 - 70% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)		University Update on Each Initiative
Improve graduation rates through QEP implementation		Two key faculty assigned duties to support QEP; revised implementation plan to enhance student success; enhanced tutoring; increase in FTIC graduation rate
Increase faculty/student research and creative activity		Research funding at all-time high. Increased student presentations, research posters and papers and student research awards, teaching and research assistants. National student research awards. E & G funds reallocated to support these efforts because of tuition differential support in other areas.
Enhanced undergraduate programs		Senior faculty reassigned to teach in Gen Ed
Improve graduation rates through QEP implementation and creation of Student Success Center		Two key faculty assigned duties to support QEP; revised implementation plan to enhance student success; enhanced tutoring; increase in FTIC graduation rate; Student Success Center, expansion of Tutoring Center
Additional Detail, where applicable:		
Total Number of Faculty Hired or Retained (funded by tuition differential):	26	
Total Number of Advisors Hired or Retained (funded by tuition differential):	3	
Total Number of Course Sections Added or Saved (funded by tuition differential):	130	
2013-2014 - 30% Initiatives (list the initiatives provided in the 2013-14 tuition differential request)		University Update on Each Initiative
Expand access for students and accelerated path to graduation	Two senior students were incentivized to graduate in four years with a \$2,500 grant which will repay \$2,500 in student loans if the student graduated in spring 2013. Awards will be made once degree verification can be confirmed.	
Provide financial support for students with limited income	Larger USF need based grant awards were made to students based on their academic potential and USF academic record.	
More students supported with financial aid scholarships and reduced loan indebtedness	The number of students receiving a need based grant increased from 509 to 809, or by 59%.	
Expand access for students and accelerated path to graduation	Two senior students were incentivized to graduate in four years with a \$2,500 grant which will repay \$2,500 in student loans if the student graduated in spring 2013. Awards will be made once degree verification can be confirmed.	
Additional Information (estimates as of April 30, 2014):		
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	809	
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,308	
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	250	
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2,500	

FISCAL INFORMATION (continued)



TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES, & AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15

University Tuition Differential

Budget Entity: 48900100 (Educational & General)
SF/Fund: 2164xxx (Student and Other Fees Trust Fund)

	Estimated Actual* 2013-14	Estimated 2014-15
<hr/>		
FTE Positions:		
Faculty	22.8	24.0
Advisors	2.5	3.0
Staff	4.4	5.0
Total FTE Positions:	<hr/> 29.7	<hr/> 32.0
<hr/>		
Balance Forward from Prior Periods		
Balance Forward	\$ 447,200	\$ 262,952
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	<hr/> \$ 447,200	<hr/> \$ 262,952
<hr/>		
Receipts / Revenues		
Tuition Differential Collections	\$ 3,155,600	\$ 3,338,300
Interest Revenue - Current Year	2,000	2,000
Interest Revenue - From Carryforward		
Balance	1,000	1,000
Total Receipts / Revenues:	<hr/> \$ 3,158,600	<hr/> \$ 3,341,300
<hr/>		
Expenditures		
Salaries & Benefits	\$ 1,758,900	\$ 1,919,000
Other Personal Services	40,000	40,000
Expenses	27,000	30,000
Operating Capital Outlay	-	-
Student Financial Assistance	1,069,748	1,131,684
Expended From Carryforward Balance	447,200	250,000
**Other Category Expenditures	-	-
Total Expenditures:	<hr/> \$ 3,342,848	<hr/> \$ 3,370,684
Ending Balance Available:	<hr/>\$ 262,952	<hr/>\$ 233,568

*Since the 2013-14 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University: University of South Florida, St. Petersburg								
<u>Undergraduate Students</u>	Actual-----			Projected-----				
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	
Tuition:								
Base Tuition - (0% inc. for 2014-15 to 2017-18)	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07	
Tuition Differential	21.42	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14	
Total Base Tuition & Differential per Credit Hour	\$124.74	\$138.46	\$140.21	\$140.21	\$140.21	\$140.21	\$140.21	
% Change		11.0%	1.3%	0.0%	0.0%	0.0%	0.0%	
Fees (per credit hour):								
Student Financial Aid ¹	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25	
Capital Improvement ²	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	
Activity & Service	\$24.80	\$25.05	\$25.63	\$25.63	\$25.63	\$25.63	\$25.63	
Health	\$2.64	\$3.90	\$4.90	\$4.90	\$4.90	\$4.90	\$4.90	
Athletic	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	
Transportation Access	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	
Technology ¹	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25	
Green Fee (USF, NCF, UWF only)	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	
Student Life & Services Fee (UNF only)								
Marshall Center Fee (USF only)								
Student Affairs Facility Use Fee (FSU only)								
Total Fees	\$48.22	\$51.73	\$53.49	\$53.49	\$53.49	\$53.49	\$53.49	
Total Tuition and Fees per Credit Hour	\$172.96	\$190.19	\$193.70	\$193.70	\$193.70	\$193.70	\$193.70	
% Change		10.0%	1.8%	0.0%	0.0%	0.0%	0.0%	
Fees (block per term):								
Activity & Service								
Health								
Athletic	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	
Transportation Access								
Marshall Center Fee (USF only)								
Student Affairs Facility Use Fee (FSU only)								
List any new fee proposed								
Total Block Fees per term	\$5.00							
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Total Tuition for 30 Credit Hours	\$3,742.20	\$4,153.80	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	
Total Fees for 30 Credit Hours	\$1,456.60	\$1,561.90	\$1,614.70	\$1,614.70	\$1,614.70	\$1,614.70	\$1,614.70	
Total Tuition and Fees for 30 Credit Hours	\$5,198.80	\$5,715.70	\$5,821.00	\$5,821.00	\$5,821.00	\$5,821.00	\$5,821.00	
\$ Change		\$516.90	\$105.30		\$0.00	\$0.00	\$0.00	
% Change		9.9%	1.8%		0.0%	0.0%	0.0%	
Out-of-State Fees								
Out-of-State Undergraduate Fee	\$291.68	\$315.00	\$346.50	\$346.50	\$346.50	\$346.50	\$346.50	
Out-of-State Undergraduate Student Financial Aid ³	\$14.58	\$15.75	\$17.32	\$17.32	\$17.32	\$17.32	\$17.32	
Total per credit hour	\$306.26	\$330.75	\$363.82	\$363.82	\$363.82	\$363.82	\$363.82	
% Change		8.0%	10.0%	0.0%	0.0%	0.0%	0.0%	
Total Tuition for 30 Credit Hours	\$12,492.60	\$13,603.80	\$14,601.30	\$14,601.30	\$14,601.30	\$14,601.30	\$14,601.30	
Total Fees for 30 Credit Hours	\$1,894.00	\$2,034.40	\$2,134.30	\$2,134.30	\$2,134.30	\$2,134.30	\$2,134.30	
Total Tuition and Fees for 30 Credit Hours	\$14,386.60	\$15,638.20	\$16,735.60	\$16,735.60	\$16,735.60	\$16,735.60	\$16,735.60	
\$ Change		\$1,251.60	\$1,097.40		\$0.00	\$0.00	\$0.00	
% Change		8.7%	7.0%		0.0%	0.0%	0.0%	



ENROLLMENT PLANNING

Planned Enrollment Growth by Student Type (for all E&G students at all campuses)

	5 YEAR TREND (2008-13)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	62%Δ	1,624	41%	1,400	41%	1,414	41%	1,428	41%
FTIC (Profile Admit)	200%Δ	12	0%	0	0%	0	0%	0	0%
AA Transfers*	15%Δ	1,486	38%	1,298	38%	1,311	38%	1,324	38%
Other Transfers	-1%Δ	827	21%	717	21%	724	21%	732	21%
Subtotal	26%Δ	3,949	100%	3,415	100%	3,449	100%	3,484	100%
GRADUATE STUDENTS									
Master's	23%Δ	552	100%	568	100%	615	100%	633	100%
Research Doctoral	%Δ	n/a	xx%	n/a	xx%	n/a	xx%	n/a	xx%
Professional Doctoral	%Δ	n/a	xx%	n/a	xx%	n/a	xx%	n/a	xx%
Subtotal	23%Δ	552	100%	568	100%	615	100%	633	100%
NOT-DEGREE SEEKING	26%Δ	239		241		244		246	
MEDICAL	%Δ	n/a		n/a		n/a		n/a	
TOTAL	26%Δ	4,740		4,224		4,308		4,363	

Note*: AA transfers refer only to transfers from the Florida College System.

Planned Enrollment Growth by Method of Instruction (for all E&G students at all campuses)

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	36%Δ	982	33%	961	30%	995	30%	1,030	30%
HYBRID (50%-79%)	%Δ	27	1%	352	11%	464	14%	481	14%
TRADITIONAL (<50%)	5%Δ	1982	66%	1,891	59%	1857	56%	1,922	56%
TOTAL	15%Δ	2,991	100%	3,204	100%	3,317	100%	3,433	100%
GRADUATE									
DISTANCE (80%)	82%Δ	113	39%	80	26%	83	26%	85	26%
HYBRID (50%-79%)	-100%Δ	0	0%	25	8%	35	11%	36	11%
TRADITIONAL (<50%)	-12%Δ	173	61%	202	66%	200	63%	207	63%
TOTAL	10%Δ	286	100%	307	100%	317	100%	328	100%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Planned Enrollment Plan by Residency and Student Level (*Florida FTE*)

Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*	
STATEFUNDABLE									
<i>Florida Resident</i>									
LOWER	858	657	700	710	725	754	784	815	3.20%
UPPER	1,486	1,486	1,462	1,470	1,475	1,534	1,595	1,659	2.69%
GRAD I	215	227	223	230	238	247	255	264	3.50%
GRAD II	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
TOTAL	2,559	2,370	2,385	2,410	2,438	2,535	2,634	2,738	3.00%
<i>Non- Resident</i>									
LOWER	36	0	37	39	40	41	43	44	3.50%
UPPER	34	0	35	36	38	39	40	42	3.50%
GRAD I	15	0	16	16	17	17	18	18	3.50%
GRAD II	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
TOTAL	85	0	88	91	94	98	101	104	3.50%
TOTAL									
LOWER	894	657	737	749	765	795	827	859	3.40%
UPPER	1,520	1,486	1,497	1,506	1,513	1,573	1,635	1,701	2.80%
GRAD I	230	227	239	246	255	264	273	282	3.50%
GRAD II	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
TOTAL	2,644	2,370	2,473	2,501	2,533	2,632	2,735	2,842	3.00%
NOT STATEFUNDABLE									
LOWER	360	n/a	373	386	399	413	428	443	3.50%
UPPER	647	n/a	670	693	717	742	768	795	3.50%
GRAD I	106	n/a	110	114	118	122	126	130	3.50%
GRAD II	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
TOTAL	1,113	n/a	1,152	1,192	1,234	1,277	1,322	1,368	3.50%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note*:The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.



ACADEMIC PROGRAM COORDINATION

New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED		PROJECTED ENROLLMENT IN SYSTEM	PROPOSED SUBMISSION DATE <i>in 5th year</i>	TO UBOT
				VIA DISTANCE LEARNING	IN SYSTEM			
BACHELOR'S PROGRAMS								

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS

Master of Accountancy	52.0301	Critical Workforce Gap Analysis	UF, FSU, FAU, FIU, UCF, UNF	No	45	September 2014
DOCTORAL PROGRAMS						

New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED		PROJECTED ENROLLMENT IN SYSTEM	PROPOSED DATE OF SUBMISSION	TO UBOT
				VIA DISTANCE LEARNING	IN SYSTEM			
BACHELOR'S PROGRAMS								
Data Analytics	52.1301	Economic Development--STEM	UF				March 2016	

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS

DOCTORAL PROGRAMS



DEFINITIONS

Performance Based Funding

Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation <i>Instructional costs to the university</i>	<p>This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.</p> <p>Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.</p> <p>Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.</p>
Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation <i>Instructional costs to the university</i>	<p>This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage.</p> <p>Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.</p>
Average Cost per Bachelor's Degree <i>Instructional costs to the university</i>	<p>For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours.</p> <p>Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).</p>
Six Year FTIC Graduation Rate <i>Instructional costs to the university</i>	<p>This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (e.g., PharmD) are included in the cohorts. Students who are active duty military are not included in the data.</p> <p>Source: State University Database System (SUDS).</p>
Academic Progress Rate <i>2nd Year Retention with GPA Above 2.0</i>	<p>This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer).</p> <p>Source: State University Database System (SUDS).</p>
University Access Rate <i>Percent of Undergraduates with a Pell-grant</i>	<p>This metric is based on the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric.</p> <p>Source: State University Database System (SUDS).</p>
Bachelor's Degrees Awarded within Programs of Strategic Emphasis (includes STEM)	<p>This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).</p> <p>Source: State University Database System (SUDS).</p>
Graduate Degrees Awarded within Programs of Strategic Emphasis (includes STEM)	<p>This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).</p> <p>Source: State University Database System (SUDS).</p>



Freshmen in Top 10% of High School Class Applies to: NCF	Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class. Source: New College of Florida.
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BOG Choice Metrics

Percent of Bachelor's Degrees Without Excess Hours

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

Number of Faculty Awards

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards.

Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

National Ranking for Institutional & Program Achievements

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

BOT Choice Metrics

Percent of R&D Expenditures Funded from External Sources FAMU

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

Bachelor's Degrees Awarded to Minorities FAU, FGCU, FIU

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.
Source: State University Database System (SUDS).

National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News FSU

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.
Source: US News and World Report's annual National University rankings.



Percent of Undergraduate Seniors Participating in a Research Course NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
Number of Bachelor Degrees Awarded Annually UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
Total Research Expenditures UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
Percent of Course Sections Offered via Distance and Blended Learning UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
Number of Postdoctoral Appointees USF	This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar. Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
Percentage of Adult Undergraduates Enrolled UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).

Preeminent Research University Funding Metrics

Average GPA and SAT Score	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B', 'E') with an admission action of admitted or provisionally admitted ('A', 'P', 'X').
Public University National Ranking	A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
Freshman Retention Rate (Full-time, FTIC)	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.
6-year Graduation Rate (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1% -2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.



National Academy Memberships	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
Total Annual Research Expenditures (\$M) (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M) (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount
National Ranking in S.T.E.M. Research Expenditures	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
Patents Awarded (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
Doctoral Degrees Awarded Annually	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report Note: per legislative workpapers, this metric does not include Professional degrees.
Number of Post-Doctoral Appointees	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
Endowment Size (\$M)	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.



Goals Common to All Universities

Academic Quality

Avg. SAT Score (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B', 'E') with an admission action of admitted or provisionally admitted ('A', 'P', 'X').
Avg. HS GPA	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.

Professional/Licensure Exam First-time Pass Rates	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
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Operational Efficiency

Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see link .
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FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
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AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
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Average Time to Degree (for FTIC)	This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.
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Return on Investment

Bachelor's Degrees Awarded	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).
Graduate Degrees Awarded	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
Percent of Graduate Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).



Goals Specific to Research Universities

Academic Quality

Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

Return on Investment

Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 minus table 52), but now data must be queried via WebCASPAR.

Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

National rank is higher than predicted by Financial Resources Ranking based on US News & World Report

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World Report

Research Doctoral Degrees Awarded

The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).



Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).
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Student Debt Summary

Percent of Bachelor's Recipients with Debt	This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans. Source: Common Dataset (H4).
Average Amount of Debt for Bachelor's who have graduated with debt	This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution. Source: Common Dataset (H5).
Student Loan Cohort Default Rate (3rd Year)	Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see: http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html .

Three Year CDR				
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)	
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	<u>10/01/2008 to 9/30/2011</u> <u>10/01/2008 to 9/30/2009</u>	
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	<u>10/01/2009 to 9/30/2012</u> <u>10/01/2009 to 9/30/2010</u>	
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	<u>10/01/2010 to 9/30/2013</u> <u>10/01/2010 to 9/30/2011</u>	
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	<u>10/01/2011 to 9/30/2014</u> <u>10/01/2011 to 9/30/2012</u>	
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	<u>10/01/2012 to 9/30/2015</u> <u>10/01/2012 to 9/30/2013</u>	
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	<u>10/01/2013 to 9/30/2016</u> <u>10/01/2013 to 9/30/2014</u>	
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	<u>10/01/2014 to 9/30/2017</u> <u>10/01/2014 to 9/30/2015</u>	